

UNITED STATES BANKRUPTCY COURT  
DISTRICT OF UTAH

In re: **David Alexander Matheson**

Debtor(s).

Case No.  
Chapter  
Trustee:

**18-28089**  
**13**  
**Jenkins**

AMENDMENT DECLARATION

Please circle or underline amended material when appropriate.

1. PETITION  REOPENING: Yes  No  CONVERSION(13 to 7) Yes  No   
**When changing debtor's address, please file separate change of address form.**  
**When amending, please submit the changes/additions only!**

2. SCHEDULES: A  B  C  D  E  F  G  H  I  J   
Are you changing the address, amounts, etc., or adding a creditor?  
**Changing  Adding  (\$31 amendment fee required for D, E, & F; OR  IFP Waiver)**

3. AMENDED AMOUNTS/TOTALS OF SCHEDULES:

4. STATEMENT OF AFFAIRS:

5. AMENDED CHAPTER 13 PLAN:

6. FORM 122C-2: **X**

If you have amended schedules D, E, F by adding a creditor, you owe \$31.00 amendment fee. Fee attached \_\_\_\_\_

If schedules D, E, F were amended but no creditors added or adding a listed creditor's attorney, no fee necessary.

No fee attached

**Reason no fee is attached** \_\_\_\_\_

**It is the debtor's responsibility to notify additional creditors by sending a 341 notice and/or Discharge Order to the creditors added to the schedules/matrix.**

A certificate of mailing to creditors should be filed with the Clerk's office (see below).

I declare under penalty of perjury that the information provided in this attached amendment is true and correct.

**/s/ David Alexander Matheson** **December 7, 2018**  
**David Alexander Matheson** Date  
Debtor

U.S. Trustee's Office and Trustee in the case supplied copies of amendment(s)? Yes  No

**/s/ Jory L. Trease, Bar No.**

**Jory L. Trease, Bar No. 4929**

ATTORNEY FOR DEBTOR(S)

**CERTIFICATE OF MAILING**

I hereby certify that a true and correct copy of the foregoing was mailed, postage prepaid, to creditors of this estate as follows (please mark the appropriate lines(s):

341 Notice to creditors added by this amendment.  
 Discharge Notice to creditors added by this amendment.  
 Amended Chapter 13 Plan to all creditors.

Fill in this information to identify your case:

Debtor 1	<b>David Alexander Matheson</b>		
	First Name	Middle Name	Last Name
Debtor 2 (Spouse if, filing)	First Name	Middle Name	Last Name
United States Bankruptcy Court for the: <u>DISTRICT OF UTAH</u>			
Case number (if known)	<u>18-28089</u>		

Check if this is an amended filing

**Official Form 106E/F**

**Schedule E/F: Creditors Who Have Unsecured Claims**

**12/15**

Be as complete and accurate as possible. Use Part 1 for creditors with PRIORITY claims and Part 2 for creditors with NONPRIORITY claims. List the other party to any executory contracts or unexpired leases that could result in a claim. Also list executory contracts on Schedule A/B: Property (Official Form 106A/B) and on Schedule G: Executory Contracts and Unexpired Leases (Official Form 106G). Do not include any creditors with partially secured claims that are listed in Schedule D: Creditors Who Have Claims Secured by Property. If more space is needed, copy the Part you need, fill it out, number the entries in the boxes on the left. Attach the Continuation Page to this page. If you have no information to report in a Part, do not file that Part. On the top of any additional pages, write your name and case number (if known).

**Part 1: List All of Your PRIORITY Unsecured Claims**

1. Do any creditors have priority unsecured claims against you?

No. Go to Part 2.  
 Yes.

2. List all of your priority unsecured claims. If a creditor has more than one priority unsecured claim, list the creditor separately for each claim. For each claim listed, identify what type of claim it is. If a claim has both priority and nonpriority amounts, list that claim here and show both priority and nonpriority amounts. As much as possible, list the claims in alphabetical order according to the creditor's name. If you have more than two priority unsecured claims, fill out the Continuation Page of Part 1. If more than one creditor holds a particular claim, list the other creditors in Part 3.

(For an explanation of each type of claim, see the instructions for this form in the instruction booklet.)

		Total claim	Priority amount	Nonpriority amount	
2.1	<b>Internal Revenue Service</b> Priority Creditor's Name <b>PO Box 7346</b> <b>Philadelphia, PA 19101</b> Number Street City State Zip Code	Last 4 digits of account number	<u>\$22,951.95</u>	<u>\$22,951.95</u>	<u>\$0.00</u>
		When was the debt incurred?	<u>2014, 2017</u>		
		As of the date you file, the claim is:	Check all that apply		
		<input type="checkbox"/> Contingent <input type="checkbox"/> Unliquidated <input type="checkbox"/> Disputed			
		Type of PRIORITY unsecured claim:	<input type="checkbox"/> Domestic support obligations <input checked="" type="checkbox"/> Taxes and certain other debts you owe the government <input type="checkbox"/> Claims for death or personal injury while you were intoxicated <input type="checkbox"/> Other. Specify <u>Income Tax</u>		

2.2	<b>Internal Revenue Service</b> Priority Creditor's Name <b>PO Box 7346</b> <b>Philadelphia, PA 19101</b> Number Street City State Zip Code	Last 4 digits of account number	<u>\$10,764.00</u>	<u>\$10,764.00</u>	<u>\$0.00</u>
		When was the debt incurred?	<u>12/31/2018</u>		
		As of the date you file, the claim is:	Check all that apply		
		<input type="checkbox"/> Contingent <input type="checkbox"/> Unliquidated <input type="checkbox"/> Disputed			
		Type of PRIORITY unsecured claim:	<input type="checkbox"/> Domestic support obligations <input checked="" type="checkbox"/> Taxes and certain other debts you owe the government <input type="checkbox"/> Claims for death or personal injury while you were intoxicated <input type="checkbox"/> Other. Specify <u>2018 Federal Taxes</u>		

2.3

<b>Peggy Matheson</b> Priority Creditor's Name <b>4267 S Twin River Way</b> <b>#1413</b> <b>Taylorsville, UT 84123</b> Number Street City State Zip Code	Last 4 digits of account number _____	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Who incurred the debt?</b> Check one.	When was the debt incurred?			
<input checked="" type="checkbox"/> Debtor 1 only				
<input type="checkbox"/> Debtor 2 only				
<input type="checkbox"/> Debtor 1 and Debtor 2 only				
<input type="checkbox"/> At least one of the debtors and another				
<input type="checkbox"/> <b>Check if this claim is for a community debt</b>				
<b>Is the claim subject to offset?</b>				
<input checked="" type="checkbox"/> No				
<input type="checkbox"/> Yes				
<b>As of the date you file, the claim is:</b> Check all that apply				
<input type="checkbox"/> Contingent				
<input type="checkbox"/> Unliquidated				
<input type="checkbox"/> Disputed				
<b>Type of PRIORITY unsecured claim:</b>				
<input checked="" type="checkbox"/> Domestic support obligations				
<input type="checkbox"/> Taxes and certain other debts you owe the government				
<input type="checkbox"/> Claims for death or personal injury while you were intoxicated				
<input type="checkbox"/> Other. Specify _____				
<b>Ongoing Alimony only</b>				

2.4

<b>Utah State Tax Commission</b> Priority Creditor's Name <b>210 N 1950 W</b> <b>Salt Lake City, UT 84134-0266</b> Number Street City State Zip Code	Last 4 digits of account number _____	<b>\$1,514.00</b>	<b>\$1,514.00</b>	<b>\$0.00</b>
<b>Who incurred the debt?</b> Check one.	When was the debt incurred?			
<input type="checkbox"/> Debtor 1 only	2017			
<input type="checkbox"/> Debtor 2 only				
<input type="checkbox"/> Debtor 1 and Debtor 2 only				
<input checked="" type="checkbox"/> At least one of the debtors and another				
<input type="checkbox"/> <b>Check if this claim is for a community debt</b>				
<b>Is the claim subject to offset?</b>				
<input checked="" type="checkbox"/> No				
<input type="checkbox"/> Yes				
<b>As of the date you file, the claim is:</b> Check all that apply				
<input type="checkbox"/> Contingent				
<input type="checkbox"/> Unliquidated				
<input type="checkbox"/> Disputed				
<b>Type of PRIORITY unsecured claim:</b>				
<input type="checkbox"/> Domestic support obligations				
<input checked="" type="checkbox"/> Taxes and certain other debts you owe the government				
<input type="checkbox"/> Claims for death or personal injury while you were intoxicated				
<input type="checkbox"/> Other. Specify _____				
<b>Income Taxes</b>				

2.5

<b>Utah State Tax Commission</b> Priority Creditor's Name <b>210 N 1950 W</b> <b>Salt Lake City, UT 84134-0266</b> Number Street City State Zip Code	Last 4 digits of account number _____	<b>\$1,242.00</b>	<b>\$1,242.00</b>	<b>\$0.00</b>
<b>Who incurred the debt?</b> Check one.	When was the debt incurred?			
<input checked="" type="checkbox"/> Debtor 1 only	12/31/2018			
<input type="checkbox"/> Debtor 2 only				
<input type="checkbox"/> Debtor 1 and Debtor 2 only				
<input type="checkbox"/> At least one of the debtors and another				
<input type="checkbox"/> <b>Check if this claim is for a community debt</b>				
<b>Is the claim subject to offset?</b>				
<input checked="" type="checkbox"/> No				
<input type="checkbox"/> Yes				
<b>As of the date you file, the claim is:</b> Check all that apply				
<input type="checkbox"/> Contingent				
<input type="checkbox"/> Unliquidated				
<input type="checkbox"/> Disputed				
<b>Type of PRIORITY unsecured claim:</b>				
<input type="checkbox"/> Domestic support obligations				
<input checked="" type="checkbox"/> Taxes and certain other debts you owe the government				
<input type="checkbox"/> Claims for death or personal injury while you were intoxicated				
<input type="checkbox"/> Other. Specify _____				
<b>2018 Utah State Taxes</b>				

**Part 2: List All of Your NONPRIORITY Unsecured Claims**

**3. Do any creditors have nonpriority unsecured claims against you?**

No. You have nothing to report in this part. Submit this form to the court with your other schedules.  
 Yes.

**4. List all of your nonpriority unsecured claims in the alphabetical order of the creditor who holds each claim.** If a creditor has more than one nonpriority unsecured claim, list the creditor separately for each claim. For each claim listed, identify what type of claim it is. Do not list claims already included in Part 1. If more than one creditor holds a particular claim, list the other creditors in Part 3. If you have more than three nonpriority unsecured claims fill out the Continuation Page of Part 2.

**Total claim**

Debtor 1 **David Alexander Matheson**

<b>4.1</b>	<p><b>American Express</b> Nonpriority Creditor's Name</p> <p><b>P.o. Box 981535</b> <b>El Paso, TX 79998-1535</b></p> <p>Number Street City State Zip Code</p> <p><b>Who incurred the debt?</b> Check one.</p> <p><input checked="" type="checkbox"/> Debtor 1 only</p> <p><input type="checkbox"/> Debtor 2 only</p> <p><input type="checkbox"/> Debtor 1 and Debtor 2 only</p> <p><input type="checkbox"/> At least one of the debtors and another</p> <p><input type="checkbox"/> <b>Check if this claim is for a community debt</b></p> <p><b>Is the claim subject to offset?</b></p> <p><input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes</p>	<p>Last 4 digits of account number <b>1005</b></p> <p><b>Date Opened: 01/1/2014 Last Used: 07/9/2017</b></p> <p><b>As of the date you file, the claim is:</b> Check all that apply</p> <p><input type="checkbox"/> Contingent</p> <p><input type="checkbox"/> Unliquidated</p> <p><input type="checkbox"/> Disputed</p> <p><b>Type of NONPRIORITY unsecured claim:</b></p> <p><input type="checkbox"/> Student loans</p> <p><input type="checkbox"/> Obligations arising out of a separation agreement or divorce that you did not report as priority claims</p> <p><input type="checkbox"/> Debts to pension or profit-sharing plans, and other similar debts</p> <p><input checked="" type="checkbox"/> Other. Specify <b>_____</b></p>	<b>\$2,271.00</b>
<b>4.2</b>	<p><b>Bankamerica</b> Nonpriority Creditor's Name</p> <p><b>4909 Savarese Cir</b> <b>Tampa, FL 33634</b></p> <p>Number Street City State Zip Code</p> <p><b>Who incurred the debt?</b> Check one.</p> <p><input checked="" type="checkbox"/> Debtor 1 only</p> <p><input type="checkbox"/> Debtor 2 only</p> <p><input type="checkbox"/> Debtor 1 and Debtor 2 only</p> <p><input type="checkbox"/> At least one of the debtors and another</p> <p><input type="checkbox"/> <b>Check if this claim is for a community debt</b></p> <p><b>Is the claim subject to offset?</b></p> <p><input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes</p>	<p>Last 4 digits of account number <b>4023</b></p> <p><b>Opened 10/10 Last Active 5/01/13</b></p> <p><b>As of the date you file, the claim is:</b> Check all that apply</p> <p><input type="checkbox"/> Contingent</p> <p><input type="checkbox"/> Unliquidated</p> <p><input type="checkbox"/> Disputed</p> <p><b>Type of NONPRIORITY unsecured claim:</b></p> <p><input type="checkbox"/> Student loans</p> <p><input type="checkbox"/> Obligations arising out of a separation agreement or divorce that you did not report as priority claims</p> <p><input type="checkbox"/> Debts to pension or profit-sharing plans, and other similar debts</p> <p><input checked="" type="checkbox"/> Other. Specify <b>FHA Real Estate Mortgage</b></p>	<b>\$0.00</b>
<b>4.3</b>	<p><b>Bankamerica</b> Nonpriority Creditor's Name</p> <p><b>4909 Savarese Cir</b> <b>Tampa, FL 33634</b></p> <p>Number Street City State Zip Code</p> <p><b>Who incurred the debt?</b> Check one.</p> <p><input checked="" type="checkbox"/> Debtor 1 only</p> <p><input type="checkbox"/> Debtor 2 only</p> <p><input type="checkbox"/> Debtor 1 and Debtor 2 only</p> <p><input type="checkbox"/> At least one of the debtors and another</p> <p><input type="checkbox"/> <b>Check if this claim is for a community debt</b></p> <p><b>Is the claim subject to offset?</b></p> <p><input checked="" type="checkbox"/> No</p> <p><input type="checkbox"/> Yes</p>	<p>Last 4 digits of account number <b>2213</b></p> <p><b>Opened 03/09 Last Active 10/19/10</b></p> <p><b>As of the date you file, the claim is:</b> Check all that apply</p> <p><input type="checkbox"/> Contingent</p> <p><input type="checkbox"/> Unliquidated</p> <p><input type="checkbox"/> Disputed</p> <p><b>Type of NONPRIORITY unsecured claim:</b></p> <p><input type="checkbox"/> Student loans</p> <p><input type="checkbox"/> Obligations arising out of a separation agreement or divorce that you did not report as priority claims</p> <p><input type="checkbox"/> Debts to pension or profit-sharing plans, and other similar debts</p> <p><input checked="" type="checkbox"/> Other. Specify <b>FHA Real Estate Mortgage</b></p>	<b>\$0.00</b>

Debtor 1 **David Alexander Matheson**

<b>4.4</b>	<b>Barclays Bank Delaware</b> Nonpriority Creditor's Name  <b>Po Box 8803</b> <b>Wilmington, DE 19899</b> Number Street City State Zip Code  <b>Who incurred the debt?</b> Check one. <input checked="" type="checkbox"/> Debtor 1 only <input type="checkbox"/> Debtor 2 only <input type="checkbox"/> Debtor 1 and Debtor 2 only <input type="checkbox"/> At least one of the debtors and another <input type="checkbox"/> <b>Check if this claim is for a community debt</b> <b>Is the claim subject to offset?</b> <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	<b>Last 4 digits of account number</b> <b>4119</b> <b>When was the debt incurred?</b> <b>Opened 06/09 Last Active 8/13/12</b>  <b>As of the date you file, the claim is:</b> Check all that apply <input type="checkbox"/> Contingent <input type="checkbox"/> Unliquidated <input type="checkbox"/> Disputed <b>Type of NONPRIORITY unsecured claim:</b> <input type="checkbox"/> Student loans <input type="checkbox"/> Obligations arising out of a separation agreement or divorce that you did not report as priority claims <input type="checkbox"/> Debts to pension or profit-sharing plans, and other similar debts <input checked="" type="checkbox"/> Other. Specify <b>Credit Card</b>	<b>\$0.00</b>
<b>4.5</b>	<b>Bk Of Amer</b> Nonpriority Creditor's Name  <b>4909 Savarese Cir</b> <b>Tampa, FL 33634</b> Number Street City State Zip Code  <b>Who incurred the debt?</b> Check one. <input checked="" type="checkbox"/> Debtor 1 only <input type="checkbox"/> Debtor 2 only <input type="checkbox"/> Debtor 1 and Debtor 2 only <input type="checkbox"/> At least one of the debtors and another <input type="checkbox"/> <b>Check if this claim is for a community debt</b> <b>Is the claim subject to offset?</b> <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	<b>Last 4 digits of account number</b> <b>8410</b> <b>When was the debt incurred?</b> <b>Opened 11/03 Last Active 12/07/08</b>  <b>As of the date you file, the claim is:</b> Check all that apply <input type="checkbox"/> Contingent <input type="checkbox"/> Unliquidated <input type="checkbox"/> Disputed <b>Type of NONPRIORITY unsecured claim:</b> <input type="checkbox"/> Student loans <input type="checkbox"/> Obligations arising out of a separation agreement or divorce that you did not report as priority claims <input type="checkbox"/> Debts to pension or profit-sharing plans, and other similar debts <input checked="" type="checkbox"/> Other. Specify <b>Automobile</b>	<b>\$0.00</b>
<b>4.6</b>	<b>Capital One</b> Nonpriority Creditor's Name  <b>15000 Capital One Dr</b> <b>Richmond, VA 23238</b> Number Street City State Zip Code  <b>Who incurred the debt?</b> Check one. <input checked="" type="checkbox"/> Debtor 1 only <input type="checkbox"/> Debtor 2 only <input type="checkbox"/> Debtor 1 and Debtor 2 only <input type="checkbox"/> At least one of the debtors and another <input type="checkbox"/> <b>Check if this claim is for a community debt</b> <b>Is the claim subject to offset?</b> <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	<b>Last 4 digits of account number</b> <b>2774</b> <b>When was the debt incurred?</b> <b>Opened 08/15 Last Active 9/13/18</b>  <b>As of the date you file, the claim is:</b> Check all that apply <input type="checkbox"/> Contingent <input type="checkbox"/> Unliquidated <input type="checkbox"/> Disputed <b>Type of NONPRIORITY unsecured claim:</b> <input type="checkbox"/> Student loans <input type="checkbox"/> Obligations arising out of a separation agreement or divorce that you did not report as priority claims <input type="checkbox"/> Debts to pension or profit-sharing plans, and other similar debts <input checked="" type="checkbox"/> Other. Specify <b>Credit Card</b>	<b>\$8,620.00</b>

Debtor 1 David Alexander Matheson

4.7

**Capitol One**

Nonpriority Creditor's Name

**Attn: General Correspondence**  
**P.o. Box 30285**  
**Salt Lake City, UT 84130-0287**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No

Yes

Last 4 digits of account number

2774

\$0.00

Date Opened: Last Used:

09/13/2017

When was the debt incurred?

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify \_\_\_\_\_

4.8

**Chase Card**

Nonpriority Creditor's Name

**Po Box 15298**  
**Wilmington, DE 19850**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No

Yes

Last 4 digits of account number

8356

\$0.00

Opened 05/07 Last Active

10/02/08

When was the debt incurred?

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify **Charge Account**

4.9

**Citi**

Nonpriority Creditor's Name

**Po Box 6241**  
**Sioux Falls, SD 57117**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No

Yes

Last 4 digits of account number

9349

\$1,902.00

Opened 05/03 Last Active

10/05/18

When was the debt incurred?

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify **Credit Card**

Debtor 1 David Alexander Matheson4.1  
0**Citibank**

Nonpriority Creditor's Name

**Citibank Customer Service****Citibank Customer Service****Sioux Falls, SD 57117**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  Contingent  
 Debtor 2 only  Unliquidated  
 Debtor 1 and Debtor 2 only  Disputed  
 At least one of the debtors and another  Type of NONPRIORITY unsecured claim:  
 Check if this claim is for a community debt  Student loans  
 Is the claim subject to offset?  Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 No  Debts to pension or profit-sharing plans, and other similar debts  
 Yes  Other. Specify \_\_\_\_\_

Last 4 digits of account number

**9349****\$0.00****Date Opened: Last Used:****09/13/2017**

As of the date you file, the claim is: Check all that apply

**Discover**

Nonpriority Creditor's Name

**Customer Service****P.o. Box 30943****Salt Lake City, UT 84130-0943**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  Contingent  
 Debtor 2 only  Unliquidated  
 Debtor 1 and Debtor 2 only  Disputed  
 At least one of the debtors and another  Type of NONPRIORITY unsecured claim:  
 Check if this claim is for a community debt  Student loans  
 Is the claim subject to offset?  Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 No  Debts to pension or profit-sharing plans, and other similar debts  
 Yes  Other. Specify \_\_\_\_\_

Last 4 digits of account number

**9215****\$0.00****Date Opened: 01/1/2006 Last****Used: 07/22/2017**

As of the date you file, the claim is: Check all that apply

**Discover Fin Svcs Llc**

Nonpriority Creditor's Name

**Po Box 15316  
Wilmington, DE 19850**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  Contingent  
 Debtor 2 only  Unliquidated  
 Debtor 1 and Debtor 2 only  Disputed  
 At least one of the debtors and another  Type of NONPRIORITY unsecured claim:  
 Check if this claim is for a community debt  Student loans  
 Is the claim subject to offset?  Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 No  Debts to pension or profit-sharing plans, and other similar debts  
 Yes  Other. Specify \_\_\_\_\_

Last 4 digits of account number

**9215****\$11,561.00****Opened 08/06 Last Active****9/04/18**

As of the date you file, the claim is: Check all that apply

4.1  
2

Debtor 1 David Alexander Matheson4.1  
3**Justin Hansen**

Nonpriority Creditor's Name

**42 N 200 E****Suite 2****American Fork, UT 84003**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only

Debtor 2 only

Debtor 1 and Debtor 2 only

At least one of the debtors and another

Check if this claim is for a community debt

Is the claim subject to offset?

No

Yes

Last 4 digits of account number

**\$1,190.00**

When was the debt incurred?

As of the date you file, the claim is: Check all that apply

Contingent

Unliquidated

Disputed

## Type of NONPRIORITY unsecured claim:

Student loans

Obligations arising out of a separation agreement or divorce that you did not report as priority claims

Debts to pension or profit-sharing plans, and other similar debts

Other. Specify **Payment For 2018 Tax Preparation**

4.1  
4**Loancare Servicing Ctr**

Nonpriority Creditor's Name

**3637 Sentara Way  
Virginia Beach, VA 23452**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only

Debtor 2 only

Debtor 1 and Debtor 2 only

At least one of the debtors and another

Check if this claim is for a community debt

Is the claim subject to offset?

No

Yes

Last 4 digits of account number

**7515****\$0.00**

Opened 05/13 Last Active

**9/29/14**

As of the date you file, the claim is: Check all that apply

Contingent

Unliquidated

Disputed

## Type of NONPRIORITY unsecured claim:

Student loans

Obligations arising out of a separation agreement or divorce that you did not report as priority claims

Debts to pension or profit-sharing plans, and other similar debts

Other. Specify **FHA Real Estate Mortgage**

4.1  
5**Metlife Home Loan**

Nonpriority Creditor's Name

**Pob 630387  
Irving, TX 75063**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only

Debtor 2 only

Debtor 1 and Debtor 2 only

At least one of the debtors and another

Check if this claim is for a community debt

Is the claim subject to offset?

No

Yes

Last 4 digits of account number

**4927****\$0.00**

Opened 08/07 Last Active

**3/02/09**

As of the date you file, the claim is: Check all that apply

Contingent

Unliquidated

Disputed

## Type of NONPRIORITY unsecured claim:

Student loans

Obligations arising out of a separation agreement or divorce that you did not report as priority claims

Debts to pension or profit-sharing plans, and other similar debts

Other. Specify **Real Estate Mortgage**

4.1  
6**Mountain America Credit Union**

Nonpriority Creditor's Name

**9800 S Monroe St  
Sandy, UT 84091**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

1968\$0.00Date Opened: 09/1/2018 Last Used:

When was the debt incurred?

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify \_\_\_\_\_

4.1  
7**Mountain America Fcu**

Nonpriority Creditor's Name

**7181 S Campus View Dr  
West Jordan, UT 84084**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

0704\$14,674.00Opened 08/07 Last Active9/30/18

When was the debt incurred?

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify **Credit Card**

4.1  
8**Mountain America Fcu**

Nonpriority Creditor's Name

**7181 S Campus View Dr  
West Jordan, UT 84084**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

0600\$0.00Opened 04/17 Last Active5/31/17

When was the debt incurred?

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify **Secured**

Debtor 1 David Alexander MathesonDocument Page 10 of 33 Case number (if known) 18-280894.1  
9**Mountain America Fcu**

Nonpriority Creditor's Name

**7181 S Campus View Dr  
West Jordan, UT 84084**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

0601\$0.00Opened 05/17 Last Active  
8/05/17

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Automobile4.2  
0**Navient**

Nonpriority Creditor's Name

**P.o. Box 9000  
Wilkes-Barre, PA 18773-9000**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

8251\$0.00When was the debt incurred? 07/19/2000

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify \_\_\_\_\_4.2  
1**Navient**

Nonpriority Creditor's Name

**Po Box 9500  
Wilkes Barre, PA 18773**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

0718\$11,326.00Opened 07/00 Last Active  
9/19/18

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Educational

4.2  
2**Njclass**

Nonpriority Creditor's Name

**Hesaa- Njclass  
Po Box 11961  
Newark, NJ 07101-4961**

Number Street City State Zip Code

**Who incurred the debt? Check one.**

Debtor 1 only       Contingent  
 Debtor 2 only       Unliquidated  
 Debtor 1 and Debtor 2 only       Disputed  
 At least one of the debtors and another  
 **Check if this claim is for a community debt**

**Is the claim subject to offset?**

No       Other. Specify \_\_\_\_\_  
 Yes

Last 4 digits of account number **7154****\$0.00**

When was the debt incurred? \_\_\_\_\_

**As of the date you file, the claim is: Check all that apply**

Contingent  
 Unliquidated  
 Disputed  
**Type of NONPRIORITY unsecured claim:**  
 Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify \_\_\_\_\_

**Student Loan**4.2  
3**Nordstrom**

Nonpriority Creditor's Name

**Po Box 21865  
Seattle, WA 98111**

Number Street City State Zip Code

**Who incurred the debt? Check one.**

Debtor 1 only       Contingent  
 Debtor 2 only       Unliquidated  
 Debtor 1 and Debtor 2 only       Disputed  
 At least one of the debtors and another  
 **Check if this claim is for a community debt**

**Is the claim subject to offset?**

No       Other. Specify \_\_\_\_\_  
 Yes

Last 4 digits of account number **7065****\$0.00****Date Opened: 07/1/2017 Last****Used: 07/29/2017****When was the debt incurred? \_\_\_\_\_****As of the date you file, the claim is: Check all that apply**

Contingent  
 Unliquidated  
 Disputed  
**Type of NONPRIORITY unsecured claim:**  
 Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify \_\_\_\_\_

4.2  
4**Nordstrom/td Bank Usa**

Nonpriority Creditor's Name

**13531 E Caley Ave  
Englewood, CO 80111**

Number Street City State Zip Code

**Who incurred the debt? Check one.**

Debtor 1 only       Contingent  
 Debtor 2 only       Unliquidated  
 Debtor 1 and Debtor 2 only       Disputed  
 At least one of the debtors and another  
 **Check if this claim is for a community debt**

**Is the claim subject to offset?**

No       Other. Specify \_\_\_\_\_  
 Yes

Last 4 digits of account number **7065****\$0.00****Opened 07/17 Last Active****11/10/17****When was the debt incurred? \_\_\_\_\_****As of the date you file, the claim is: Check all that apply**

Contingent  
 Unliquidated  
 Disputed  
**Type of NONPRIORITY unsecured claim:**  
 Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify **Credit Card** \_\_\_\_\_

4.2  
5**Springleaf Financial S**

Nonpriority Creditor's Name

**600 Nw 2nd St  
Evansville, IN 47708**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number 3806\$0.00**Opened 12/07 Last Active  
5/09/08**

When was the debt incurred?

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Charge Account4.2  
6**State Of Nj Student As**

Nonpriority Creditor's Name

**4 Quakerbridge Plz  
Trenton, NJ 08619**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number 3NJC\$24,273.00**Opened 09/07 Last Active  
9/26/18**

When was the debt incurred?

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify \_\_\_\_\_**Educational**4.2  
7**State Of Nj Student As**

Nonpriority Creditor's Name

**4 Quakerbridge Plz  
Trenton, NJ 08619**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number 0NJC\$16,127.00**Opened 09/06 Last Active  
9/26/18**

When was the debt incurred?

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify \_\_\_\_\_**Educational**

Debtor 1 David Alexander MathesonDocument Page 13 of 33 Case number (if known) 18-280894.2  
8**Stu Ln Trust**

Nonpriority Creditor's Name

**701 E 60th St N  
Sioux Falls, SD 57104**

Number Street City State Zip Code

**Who incurred the debt?** Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 **Check if this claim is for a community debt**

**Is the claim subject to offset?**

No  
 Yes

Last 4 digits of account number 0321**\$0.00****Opened 7/18/00 Last Active  
7/21/11****As of the date you file, the claim is:** Check all that apply

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify \_\_\_\_\_

**Educational**4.2  
9**Stu Ln Trust**

Nonpriority Creditor's Name

**701 E 60th St N  
Sioux Falls, SD 57104**

Number Street City State Zip Code

**Who incurred the debt?** Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 **Check if this claim is for a community debt**

**Is the claim subject to offset?**

No  
 Yes

Last 4 digits of account number 0320**\$0.00****Opened 7/18/00 Last Active  
7/21/11****As of the date you file, the claim is:** Check all that apply

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify \_\_\_\_\_

**Educational**4.3  
0**Student Loan Corp**

Nonpriority Creditor's Name

**Po Box 30948  
Salt Lake City, UT 84130**

Number Street City State Zip Code

**Who incurred the debt?** Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 **Check if this claim is for a community debt**

**Is the claim subject to offset?**

No  
 Yes

Last 4 digits of account number 0023**\$18,119.00****Opened 08/09 Last Active  
9/13/18****As of the date you file, the claim is:** Check all that apply

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts  
 Other. Specify \_\_\_\_\_

**Educational**

4.3  
1**Syncb/care Credit**

Nonpriority Creditor's Name

**C/o Po Box 965036  
Orlando, FL 32896**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number 3716**\$0.00****Opened 9/25/07 Last Active  
4/22/09**

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Charge Account4.3  
2**Syncb/home Design Nahf**

Nonpriority Creditor's Name

**C/o Po Box 965036  
Orlando, FL 32896**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number 7103**\$0.00****Opened 4/02/13 Last Active  
11/26/14**

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Charge Account4.3  
3**Syncb/lowers**

Nonpriority Creditor's Name

**Po Box 956005  
Orlando, FL 32896**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number 8581**\$0.00****Opened 4/30/06 Last Active  
12/20/09**

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

**Type of NONPRIORITY unsecured claim:**

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Charge Account

4.3  
4**Td Bank N.a.**

Nonpriority Creditor's Name

**32 Chestnut St  
Lewiston, ME 04240**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

6241\$0.00

Opened 12/04 Last Active

8/21/07

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

## Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Real Estate Mortgage4.3  
5**Td Bank N.a.**

Nonpriority Creditor's Name

**32 Chestnut St  
Lewiston, ME 04240**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

3378\$0.00

Opened 08/04 Last Active

3/05/08

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

## Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Check Credit Or Line Of Credit4.3  
6**Telesis Community Cu**

Nonpriority Creditor's Name

**9301 Wennetka Ave  
Chatsworth, CA 91311**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

Last 4 digits of account number

0001\$0.00

Opened 11/01 Last Active

1/24/05

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

## Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Check Credit Or Line Of Credit

4.3  
7**Toyota Motor Credit**

Nonpriority Creditor's Name

Last 4 digits of account number

0001\$0.00**Po Box 9786  
Cedar Rapids, IA 52409**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

When was the debt incurred?

Opened 12/08 Last Active  
2/11/11

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Automobile4.3  
8**Wa Fed Na Fka Wa Fed S**

Nonpriority Creditor's Name

Last 4 digits of account number

9711\$0.00**425 Pike St  
Seattle, WA 98101**

Number Street City State Zip Code

Who incurred the debt? Check one.

Debtor 1 only  
 Debtor 2 only  
 Debtor 1 and Debtor 2 only  
 At least one of the debtors and another  
 Check if this claim is for a community debt

Is the claim subject to offset?

No  
 Yes

When was the debt incurred?

Opened 10/14 Last Active  
1/20/17

As of the date you file, the claim is: Check all that apply

Contingent  
 Unliquidated  
 Disputed

Type of NONPRIORITY unsecured claim:

Student loans  
 Obligations arising out of a separation agreement or divorce that you did not report as priority claims  
 Debts to pension or profit-sharing plans, and other similar debts

 Other. Specify Real Estate Mortgage**Part 3: List Others to Be Notified About a Debt That You Already Listed**

5. Use this page only if you have others to be notified about your bankruptcy, for a debt that you already listed in Parts 1 or 2. For example, if a collection agency is trying to collect from you for a debt you owe to someone else, list the original creditor in Parts 1 or 2, then list the collection agency here. Similarly, if you have more than one creditor for any of the debts that you listed in Parts 1 or 2, list the additional creditors here. If you do not have additional persons to be notified for any debts in Parts 1 or 2, do not fill out or submit this page.

**Part 4: Add the Amounts for Each Type of Unsecured Claim**

6. Total the amounts of certain types of unsecured claims. This information is for statistical reporting purposes only. 28 U.S.C. §159. Add the amounts for each type of unsecured claim.

Total claims from Part 1	6a. Domestic support obligations	6a.	Total Claim	
			\$	<u>0.00</u>
	6b. Taxes and certain other debts you owe the government	6b.	\$	<u>36,471.95</u>
	6c. Claims for death or personal injury while you were intoxicated	6c.	\$	<u>0.00</u>
	6d. Other. Add all other priority unsecured claims. Write that amount here.	6d.	\$	<u>0.00</u>
	6e. Total Priority. Add lines 6a through 6d.	6e.	\$	<u>36,471.95</u>
Total claims from Part 2	6f. Student loans	6f.	Total Claim	
			\$	<u>69,845.00</u>
	6g. Obligations arising out of a separation agreement or divorce that you did not report as priority claims	6g.	\$	<u>0.00</u>

Debtor 1 **David Alexander Matheson**

6h. <b>Debts to pension or profit-sharing plans, and other similar debts</b>	6h. \$ <u>0.00</u>
6i. <b>Other.</b> Add all other nonpriority unsecured claims. Write that amount here.	6i. \$ <u>40,218.00</u>
6j. <b>Total Nonpriority.</b> Add lines 6f through 6i.	6j. \$ <u>110,063.00</u>

Fill in this information to identify your case:

Debtor 1	<b>David Alexander Matheson</b>
Debtor 2 (Spouse, if filing)	
United States Bankruptcy Court for the:	<b>DISTRICT OF UTAH</b>
Case number (if known)	<b>18-28089</b>

Check if this is:

An amended filing  
 A supplement showing postpetition chapter 13 income as of the following date:

MM / DD / YYYY

## Official Form 106I

### Schedule I: Your Income

12/15

Be as complete and accurate as possible. If two married people are filing together (Debtor 1 and Debtor 2), both are equally responsible for supplying correct information. If you are married and not filing jointly, and your spouse is living with you, include information about your spouse. If you are separated and your spouse is not filing with you, do not include information about your spouse. If more space is needed, attach a separate sheet to this form. On the top of any additional pages, write your name and case number (if known). Answer every question.

#### Part 1: Describe Employment

1. **Fill in your employment information.**

If you have more than one job, attach a separate page with information about additional employers.

Include part-time, seasonal, or self-employed work.

Occupation may include student or homemaker, if it applies.

**Employment status**

**Debtor 1**

Employed  
 Not employed

**Debtor 2 or non-filing spouse**

Employed  
 Not employed

**Occupation**

**Self-Employed**

**Employer's name**

**MacMathan, LC**

**Employer's address**

**How long employed there?** 8 years

#### Part 2: Give Details About Monthly Income

**Estimate monthly income as of the date you file this form.** If you have nothing to report for any line, write \$0 in the space. Include your non-filing spouse unless you are separated.

If you or your non-filing spouse have more than one employer, combine the information for all employers for that person on the lines below. If you need more space, attach a separate sheet to this form.

<b>For Debtor 1</b>	<b>For Debtor 2 or non-filing spouse</b>
---------------------	--

2. **List monthly gross wages, salary, and commissions (before all payroll deductions).** If not paid monthly, calculate what the monthly wage would be.

2. \$ 0.00 \$ N/A

3. **Estimate and list monthly overtime pay.**

3. +\$ 0.00 +\$ N/A

4. **Calculate gross Income.** Add line 2 + line 3.

4. \$ <u>0.00</u>	\$ <u>N/A</u>
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Debtor 1 **David Alexander Matheson**

Case number (if known)

**18-28089**

	<b>For Debtor 1</b>	<b>For Debtor 2 or non-filing spouse</b>
<b>Copy line 4 here</b>	4. \$ <b>0.00</b>	\$ <b>N/A</b>
<b>5. List all payroll deductions:</b>		
5a. <b>Tax, Medicare, and Social Security deductions</b>	5a. \$ <b>0.00</b>	\$ <b>N/A</b>
5b. <b>Mandatory contributions for retirement plans</b>	5b. \$ <b>0.00</b>	\$ <b>N/A</b>
5c. <b>Voluntary contributions for retirement plans</b>	5c. \$ <b>0.00</b>	\$ <b>N/A</b>
5d. <b>Required repayments of retirement fund loans</b>	5d. \$ <b>0.00</b>	\$ <b>N/A</b>
5e. <b>Insurance</b>	5e. \$ <b>0.00</b>	\$ <b>N/A</b>
5f. <b>Domestic support obligations</b>	5f. \$ <b>0.00</b>	\$ <b>N/A</b>
5g. <b>Union dues</b>	5g. \$ <b>0.00</b>	\$ <b>N/A</b>
5h. <b>Other deductions.</b> Specify: _____	5h.+ \$ <b>0.00</b> + \$ _____	\$ <b>N/A</b>
<b>6. Add the payroll deductions.</b> Add lines 5a+5b+5c+5d+5e+5f+5g+5h.	6. \$ <b>0.00</b>	\$ <b>N/A</b>
<b>7. Calculate total monthly take-home pay.</b> Subtract line 6 from line 4.	7. \$ <b>0.00</b>	\$ <b>N/A</b>
<b>8. List all other income regularly received:</b>		
8a. <b>Net income from rental property and from operating a business, profession, or farm</b> Attach a statement for each property and business showing gross receipts, ordinary and necessary business expenses, and the total monthly net income.	8a. \$ <b>6,271.00</b>	\$ <b>N/A</b>
8b. <b>Interest and dividends</b>	8b. \$ <b>0.00</b>	\$ <b>N/A</b>
8c. <b>Family support payments that you, a non-filing spouse, or a dependent regularly receive</b> Include alimony, spousal support, child support, maintenance, divorce settlement, and property settlement.	8c. \$ <b>0.00</b>	\$ <b>N/A</b>
8d. <b>Unemployment compensation</b>	8d. \$ <b>0.00</b>	\$ <b>N/A</b>
8e. <b>Social Security</b>	8e. \$ <b>0.00</b>	\$ <b>N/A</b>
8f. <b>Other government assistance that you regularly receive</b> Include cash assistance and the value (if known) of any non-cash assistance that you receive, such as food stamps (benefits under the Supplemental Nutrition Assistance Program) or housing subsidies. Specify: _____	8f. \$ <b>0.00</b>	\$ <b>N/A</b>
8g. <b>Pension or retirement income</b>	8g. \$ <b>0.00</b>	\$ <b>N/A</b>
8h. <b>Other monthly income.</b> Specify: <b>Book Royalties</b>	8h.+ \$ <b>85.00</b> + \$ _____	\$ <b>N/A</b>
<b>9. Add all other income.</b> Add lines 8a+8b+8c+8d+8e+8f+8g+8h.	9. \$ <b>6,356.00</b>	\$ <b>N/A</b>
<b>10. Calculate monthly income.</b> Add line 7 + line 9. Add the entries in line 10 for Debtor 1 and Debtor 2 or non-filing spouse.	10. \$ <b>6,356.00</b> + \$ <b>N/A</b> = \$ <b>6,356.00</b>	
<b>11. State all other regular contributions to the expenses that you list in Schedule J.</b> Include contributions from an unmarried partner, members of your household, your dependents, your roommates, and other friends or relatives. Do not include any amounts already included in lines 2-10 or amounts that are not available to pay expenses listed in Schedule J. Specify: _____	11. +\$ <b>0.00</b>	
<b>12. Add the amount in the last column of line 10 to the amount in line 11.</b> The result is the combined monthly income. Write that amount on the <i>Summary of Schedules and Statistical Summary of Certain Liabilities and Related Data</i> , if it applies	12. \$ <b>6,356.00</b>	
<b>13. Do you expect an increase or decrease within the year after you file this form?</b>	<input checked="" type="checkbox"/> No. <input type="checkbox"/> Yes. Explain: _____	
	<b>Combined monthly income</b>	

Fill in this information to identify your case:

Debtor 1	<b>David Alexander Matheson</b>
Debtor 2	
(Spouse, if filing)	
United States Bankruptcy Court for the:	<b>DISTRICT OF UTAH</b>
Case number	<b>18-28089</b>
(If known)	

Check if this is:

An amended filing  
 A supplement showing postpetition chapter 13 expenses as of the following date:

MM / DD / YYYY

## Official Form 106J

### Schedule J: Your Expenses

12/15

Be as complete and accurate as possible. If two married people are filing together, both are equally responsible for supplying correct information. If more space is needed, attach another sheet to this form. On the top of any additional pages, write your name and case number (if known). Answer every question.

#### Part 1: Describe Your Household

##### 1. Is this a joint case?

No. Go to line 2.  
 Yes. Does Debtor 2 live in a separate household?  
 No  
 Yes. Debtor 2 must file Official Form 106J-2, Expenses for Separate Household of Debtor 2.

##### 2. Do you have dependents? No

Do not list Debtor 1 and Debtor 2.  Yes. Fill out this information for each dependent.....

Do not state the dependents names.

Dependent's relationship to Debtor 1 or Debtor 2

Dependent's age

Does dependent live with you?

No  
 Yes  
 No  
 Yes  
 No  
 Yes  
 No  
 Yes

##### 3. Do your expenses include expenses of people other than yourself and your dependents? No Yes

#### Part 2: Estimate Your Ongoing Monthly Expenses

Estimate your expenses as of your bankruptcy filing date unless you are using this form as a supplement in a Chapter 13 case to report expenses as of a date after the bankruptcy is filed. If this is a supplemental Schedule J, check the box at the top of the form and fill in the applicable date.

Include expenses paid for with non-cash government assistance if you know the value of such assistance and have included it on Schedule I: Your Income (Official Form 106I.)

#### Your expenses

##### 4. The rental or home ownership expenses for your residence. Include first mortgage payments and any rent for the ground or lot.

4. \$ **1,100.00**

##### If not included in line 4:

4a. Real estate taxes  
4b. Property, homeowner's, or renter's insurance  
4c. Home maintenance, repair, and upkeep expenses  
4d. Homeowner's association or condominium dues  
5. Additional mortgage payments for your residence, such as home equity loans

4a. \$	<b>0.00</b>
4b. \$	<b>12.00</b>
4c. \$	<b>25.00</b>
4d. \$	<b>0.00</b>
5. \$	<b>0.00</b>

Debtor 1 David Alexander Matheson

Case number (if known) 18-28089

6. <b>Utilities:</b>	
6a. Electricity, heat, natural gas	6a. \$ <b>0.00</b>
6b. Water, sewer, garbage collection	6b. \$ <b>0.00</b>
6c. Telephone, cell phone, Internet, satellite, and cable services	6c. \$ <b>50.00</b>
6d. Other. Specify: _____	6d. \$ <b>0.00</b>
7. <b>Food and housekeeping supplies</b>	7. \$ <b>300.00</b>
8. <b>Childcare and children's education costs</b>	8. \$ <b>0.00</b>
9. <b>Clothing, laundry, and dry cleaning</b>	9. \$ <b>50.00</b>
10. <b>Personal care products and services</b>	10. \$ <b>30.00</b>
11. <b>Medical and dental expenses</b>	11. \$ <b>52.00</b>
12. <b>Transportation.</b> Include gas, maintenance, bus or train fare. Do not include car payments.	12. \$ <b>200.00</b>
13. <b>Entertainment, clubs, recreation, newspapers, magazines, and books</b>	13. \$ <b>86.00</b>
14. <b>Charitable contributions and religious donations</b>	14. \$ <b>174.00</b>
15. <b>Insurance.</b> Do not include insurance deducted from your pay or included in lines 4 or 20.	
15a. Life insurance	15a. \$ <b>125.00</b>
15b. Health insurance	15b. \$ <b>13.00</b>
15c. Vehicle insurance	15c. \$ <b>0.00</b>
15d. Other insurance. Specify: _____	15d. \$ <b>0.00</b>
16. <b>Taxes.</b> Do not include taxes deducted from your pay or included in lines 4 or 20. Specify: <b>Self-Employment Taxes</b>	16. \$ <b>1,365.00</b>
17. <b>Installment or lease payments:</b>	
17a. Car payments for Vehicle 1	17a. \$ <b>0.00</b>
17b. Car payments for Vehicle 2	17b. \$ <b>0.00</b>
17c. Other. Specify: _____	17c. \$ <b>0.00</b>
17d. Other. Specify: _____	17d. \$ <b>0.00</b>
18. <b>Your payments of alimony, maintenance, and support that you did not report as deducted from your pay on line 5, Schedule I, Your Income (Official Form 106I).</b>	18. \$ <b>1,830.00</b>
19. <b>Other payments you make to support others who do not live with you.</b> Specify: _____	19. \$ <b>0.00</b>
20. <b>Other real property expenses not included in lines 4 or 5 of this form or on Schedule I: Your Income.</b>	
20a. Mortgages on other property	20a. \$ <b>0.00</b>
20b. Real estate taxes	20b. \$ <b>0.00</b>
20c. Property, homeowner's, or renter's insurance	20c. \$ <b>0.00</b>
20d. Maintenance, repair, and upkeep expenses	20d. \$ <b>0.00</b>
20e. Homeowner's association or condominium dues	20e. \$ <b>0.00</b>
21. <b>Other:</b> Specify: <b>Gym</b>	21. +\$ <b>24.00</b>
<b>Storage Unit</b>	+\$ <b>129.00</b>
<b>Continuing Education</b>	+\$ <b>33.00</b>
22. <b>Calculate your monthly expenses</b>	
22a. Add lines 4 through 21.	\$ <b>5,598.00</b>
22b. Copy line 22 (monthly expenses for Debtor 2), if any, from Official Form 106J-2	\$ <b>5,598.00</b>
22c. Add line 22a and 22b. The result is your monthly expenses.	\$ <b>5,598.00</b>
23. <b>Calculate your monthly net income.</b>	
23a. Copy line 12 (your combined monthly income) from Schedule I.	23a. \$ <b>6,356.00</b>
23b. Copy your monthly expenses from line 22c above.	23b. -\$ <b>5,598.00</b>
23c. Subtract your monthly expenses from your monthly income. The result is your <i>monthly net income</i> .	23c. \$ <b>758.00</b>
24. <b>Do you expect an increase or decrease in your expenses within the year after you file this form?</b> For example, do you expect to finish paying for your car loan within the year or do you expect your mortgage payment to increase or decrease because of a modification to the terms of your mortgage?	
<input checked="" type="checkbox"/> No.	
<input type="checkbox"/> Yes.	Explain here: _____

Fill in this information to identify your case:

Debtor 1	<b>David Alexander Matheson</b>
Debtor 2 (Spouse, if filing)	
United States Bankruptcy Court for the:	District of Utah
Case number (if known)	<b>18-28089</b>

Check as directed in lines 17 and 21:

According to the calculations required by this Statement:

1. Disposable income is not determined under 11 U.S.C. § 1325(b)(3).

2. Disposable income is determined under 11 U.S.C. § 1325(b)(3).

3. The commitment period is 3 years.

4. The commitment period is 5 years.

Check if this is an amended filing

## Official Form 122C-1

### Chapter 13 Statement of Your Current Monthly Income and Calculation of Commitment Period

12/15

Be as complete and accurate as possible. If two married people are filing together, both are equally responsible for being accurate. If more space is needed, attach a separate sheet to this form. Include the line number to which the additional information applies. On the top of any additional pages, write your name and case number (if known).

#### Part 1: Calculate Your Average Monthly Income

1. What is your marital and filing status? Check one only.

Not married. Fill out Column A, lines 2-11.

Married. Fill out both Columns A and B, lines 2-11.

Fill in the average monthly income that you received from all sources, derived during the 6 full months before you file this bankruptcy case. 11 U.S.C. § 101(10A). For example, if you are filing on September 15, the 6-month period would be March 1 through August 31. If the amount of your monthly income varied during the 6 months, add the income for all 6 months and divide the total by 6. Fill in the result. Do not include any income amount more than once. For example, if both spouses own the same rental property, put the income from that property in one column only. If you have nothing to report for any line, write \$0 in the space.

	Column A Debtor 1	Column B Debtor 2 or non-filing spouse
2. Your gross wages, salary, tips, bonuses, overtime, and commissions (before all payroll deductions).	\$ <u>0.00</u>	\$ _____
3. Alimony and maintenance payments. Do not include payments from a spouse if Column B is filled in.	\$ <u>0.00</u>	\$ _____
4. All amounts from any source which are regularly paid for household expenses of you or your dependents, including child support. Include regular contributions from an unmarried partner, members of your household, your dependents, parents, and roommates. Do not include payments from a spouse. Do not include payments you listed on line 3.	\$ <u>0.00</u>	\$ _____
5. Net income from operating a business, profession, or farm	Debtor 1	
Gross receipts (before all deductions)	\$ <u>6,743.07</u>	
Ordinary and necessary operating expenses	-\$ <u>471.76</u>	
Net monthly income from a business, profession, or farm	\$ <u>6,271.31</u>	Copy here -> \$ <u>6,271.31</u>
6. Net income from rental and other real property	Debtor 1	
Gross receipts (before all deductions)	\$ <u>0.00</u>	
Ordinary and necessary operating expenses	-\$ <u>0.00</u>	
Net monthly income from rental or other real property	\$ <u>0.00</u>	Copy here -> \$ <u>0.00</u>

Debtor 1

**David Alexander Matheson**

Case number (if known)

**18-28089**

**7. Interest, dividends, and royalties**

**8. Unemployment compensation**

Do not enter the amount if you contend that the amount received was a benefit under the Social Security Act. Instead, list it here:

For you ..... \$ **0.00**

For your spouse ..... \$ \_\_\_\_\_

**9. Pension or retirement income.** Do not include any amount received that was a benefit under the Social Security Act.

**10. Income from all other sources not listed above.** Specify the source and amount.

Do not include any benefits received under the Social Security Act or payments received as a victim of a war crime, a crime against humanity, or international or domestic terrorism. If necessary, list other sources on a separate page and put the total below.

Column A Debtor 1	Column B Debtor 2 or non-filing spouse
\$ <b>84.97</b>	\$ _____
\$ <b>0.00</b>	\$ _____

\$ **0.00** \$ \_\_\_\_\_

\$ <b>0.00</b>	\$ _____
\$ <b>0.00</b>	\$ _____
<b>+ \$ 0.00</b>	\$ _____

Total amounts from separate pages, if any.

**11. Calculate your total average monthly income.** Add lines 2 through 10 for each column. Then add the total for Column A to the total for Column B.

\$ <b>6,356.28</b>	<b>+ \$ _____</b>	<b>= \$ 6,356.28</b>
--------------------	-------------------	----------------------

Total average monthly income

**Part 2: Determine How to Measure Your Deductions from Income**

**12. Copy your total average monthly income from line 11.** ..... \$ **6,356.28**

**13. Calculate the marital adjustment.** Check one:

- You are not married. Fill in 0 below.
- You are married and your spouse is filing with you. Fill in 0 below.
- You are married and your spouse is not filing with you.

Fill in the amount of the income listed in line 11, Column B, that was NOT regularly paid for the household expenses of you or your dependents, such as payment of the spouse's tax liability or the spouse's support of someone other than you or your dependents.

Below, specify the basis for excluding this income and the amount of income devoted to each purpose. If necessary, list additional adjustments on a separate page.

If this adjustment does not apply, enter 0 below.

\$ _____	\$ _____
<b>+ \$ _____</b>	
Total ..... \$ <b>0.00</b>	Copy here=> - <b>0.00</b>

**14. Your current monthly income.** Subtract line 13 from line 12.

\$ <b>6,356.28</b>
--------------------

**15. Calculate your current monthly income for the year.** Follow these steps:

15a. Copy line 14 here=> .....

\$ <b>6,356.28</b>
--------------------

Multiply line 15a by 12 (the number of months in a year).

**x 12**

15b. The result is your current monthly income for the year for this part of the form. .....

\$ <b>76,275.36</b>
---------------------

Debtor 1

**David Alexander Matheson**

Case number (if known)

**18-28089**

**16. Calculate the median family income that applies to you. Follow these steps:**

16a. Fill in the state in which you live.

**UT**

16b. Fill in the number of people in your household.

**1**

16c. Fill in the median family income for your state and size of household.

\$ **59,002.00**

To find a list of applicable median income amounts, go online using the link specified in the separate instructions for this form. This list may also be available at the bankruptcy clerk's office.

**17. How do the lines compare?**

17a.  Line 15b is less than or equal to line 16c. On the top of page 1 of this form, check box 1, *Disposable income is not determined under 11 U.S.C. § 1325(b)(3)*. **Go to Part 3.** Do NOT fill out *Calculation of Your Disposable Income* (Official Form 122C-2).

17b.  Line 15b is more than line 16c. On the top of page 1 of this form, check box 2, *Disposable income is determined under 11 U.S.C. § 1325(b)(3)*. **Go to Part 3 and fill out Calculation of Your Disposable Income (Official Form 122C-2).** On line 39 of that form, copy your current monthly income from line 14 above.

**Part 3: Calculate Your Commitment Period Under 11 U.S.C. § 1325(b)(4)**

18. **Copy your total average monthly income from line 11.** \$ **6,356.28**

19. **Deduct the marital adjustment if it applies.** If you are married, your spouse is not filing with you, and you contend that calculating the commitment period under 11 U.S.C. § 1325(b)(4) allows you to deduct part of your spouse's income, copy the amount from line 13.

19a. If the marital adjustment does not apply, fill in 0 on line 19a.

-\$ **0.00**

19b. **Subtract line 19a from line 18.**

\$ **6,356.28**

20. **Calculate your current monthly income for the year.** Follow these steps:

20a. Copy line 19b.

\$ **6,356.28**

Multiply by 12 (the number of months in a year).

**x 12**

20b. The result is your current monthly income for the year for this part of the form

\$ **76,275.36**

20c. Copy the median family income for your state and size of household from line 16c

\$ **59,002.00**

**21. How do the lines compare?**

Line 20b is less than line 20c. Unless otherwise ordered by the court, on the top of page 1 of this form, check box 3, *The commitment period is 3 years*. Go to Part 4.

Line 20b is more than or equal to line 20c. Unless otherwise ordered by the court, on the top of page 1 of this form, check box 4, *The commitment period is 5 years*. Go to Part 4.

**Part 4: Sign Below**

By signing here, under penalty of perjury I declare that the information on this statement and in any attachments is true and correct.

**X /s/ David Alexander Matheson**

**David Alexander Matheson**

Signature of Debtor 1

Date **December 7, 2018**

MM / DD / YYYY

If you checked 17a, do NOT fill out or file Form 122C-2.

If you checked 17b, fill out Form 122C-2 and file it with this form. On line 39 of that form, copy your current monthly income from line 14 above.

Fill in this information to identify your case:

Debtor 1 David Alexander Matheson

Debtor 2 \_\_\_\_\_  
(Spouse, if filing)

United States Bankruptcy Court for the: District of Utah

Case number 18-28089  
(if known)

Check if this is an amended filing

Official Form 122C-2

## Chapter 13 Calculation of Your Disposable Income

04/16

To fill out this form, you will need your completed copy of *Chapter 13 Statement of Your Current Monthly Income and Calculation of Commitment Period* (Official Form 122C-1).

Be as complete and accurate as possible. If two married people are filing together, both are equally responsible for being accurate. If more space is needed, attach a separate sheet to this form. Include the line number to which additional information applies. On the top any additional pages, write your name and case number (if known).

### Part 1: Calculate Your Deductions from Your Income

The Internal Revenue Service (IRS) issues National and Local Standards for certain expense amounts. Use these amounts to answer the questions in lines 6-15. To find the IRS standards, go online using the link specified in the separate instructions for this form. This information may also be available at the bankruptcy clerk's office.

Deduct the expense amounts set out in lines 6-15 regardless of your actual expense. In later parts of the form, you will use some of your actual expenses if they are higher than the standards. Do not include any operating expenses that you subtracted from income in lines 5 and 6 of Form 122C-1, and do not deduct any amounts that you subtracted from your spouse's income in line 13 of Form 122C-1.

If your expenses differ from month to month, enter the average expense.

Note: Line numbers 1-4 are not used in this form. These numbers apply to information required by a similar form used in chapter 7 cases.

#### 5. The number of people used in determining your deductions from income

Fill in the number of people who could be claimed as exemptions on your federal income tax return, plus the number of any additional dependents whom you support. This number may be different from the number of people in your household.

1

#### National Standards

You must use the IRS National Standards to answer the questions in lines 6-7.

6. **Food, clothing, and other items:** Using the number of people you entered in line 5 and the IRS National Standards, fill in the dollar amount for food, clothing, and other items. \$ 647.00
7. **Out-of-pocket health care allowance:** Using the number of people you entered in line 5 and the IRS National Standards, fill in the dollar amount for out-of-pocket health care. The number of people is split into two categories--people who are under 65 and people who are 65 or older--because older people have a higher IRS allowance for health care costs. If your actual expenses are higher than this IRS amount, you may deduct the additional amount on line 22.

Debtor 1

David Alexander Matheson

Case number (if known)

18-28089

**People who are under 65 years of age**

7a. Out-of-pocket health care allowance per person	\$ <u>52</u>
7b. Number of people who are under 65	X <u>1</u>
7c. <b>Subtotal.</b> Multiply line 7a by line 7b.	\$ <u>52.00</u>
	<b>Copy here=&gt;</b> \$ <u>52.00</u>

**People who are 65 years of age or older**

7d. Out-of-pocket health care allowance per person	\$ <u>114</u>
7e. Number of people who are 65 or older	X <u>0</u>
7f. Subtotal. Multiply line 7d by line 7e.	\$ <u>0.00</u>
	<b>Copy here=&gt;</b> \$ <u>0.00</u>

7g. **Total.** Add line 7c and line 7f ..... \$ 52.00 **Copy total here=>** \$ 52.00

**Local Standards** You must use the IRS Local Standards to answer the questions in lines 8-15.

Based on information from the IRS, the U.S. Trustee Program has divided the IRS Local Standard for housing for bankruptcy purposes into two parts:

■ **Housing and utilities - Insurance and operating expenses**

■ **Housing and utilities - Mortgage or rent expenses**

To answer the questions in lines 8-9, use the U.S. Trustee Program chart. To find the chart, go online using the link specified in the separate instructions for this form. This chart may also be available at the bankruptcy clerk's office.

8. **Housing and utilities - Insurance and operating expenses:** Using the number of people you entered in line 5, fill in the dollar amount listed for your county for insurance and operating expenses. \$ 459.00

9. **Housing and utilities - Mortgage or rent expenses:**

9a. Using the number of people you entered in line 5, fill in the dollar amount listed for your county for mortgage or rent expenses. \$ 1,079.00

9b. Total average monthly payment for all mortgages and other debts secured by your home.

To calculate the total average monthly payment, add all amounts that are contractually due to each secured creditor in the 60 months after you file for bankruptcy. Next divide by 60.

Name of the creditor

Average monthly payment

-NONE-

\$ \_\_\_\_\_

9b. Total average monthly payment

\$ 0.00

**Copy here=>**

-\$

0.00 Repeat this amount on line 33a.

9c. Net mortgage or rent expense.

Subtract line 9b (total average monthly payment) from line 9a (mortgage or rent expense). If this number is less than \$0, enter \$0.

\$ 1,079.00

**Copy here=>** \$ 1,079.00

10. If you claim that the U.S. Trustee Program's division of the IRS Local Standard for housing is incorrect and affects the calculation of your monthly expenses, fill in any additional amount you claim. \$ 0.00

Explain why: \_\_\_\_\_

11. **Local transportation expenses:** Check the number of vehicles for which you claim an ownership or operating expense.

0. Go to line 14.

1. Go to line 12.

2 or more. Go to line 12.

12. **Vehicle operation expense:** Using the IRS Local Standards and the number of vehicles for which you claim the operating expenses, fill in the *Operating Costs* that apply for your Census region or metropolitan statistical area. \$ **218.00**

13. **Vehicle ownership or lease expense:** Using the IRS Local Standards, calculate the net ownership or lease expense for each vehicle below. You may not claim the expense if you do not make any loan or lease payments on the vehicle. In addition, you may not claim the expense for more than two vehicles.

**Vehicle 1 Describe Vehicle 1:**

13a. Ownership or leasing costs using IRS Local Standard..... \$ **0.00**

13b. Average monthly payment for all debts secured by Vehicle 1.

Do not include costs for leased vehicles.

To calculate the average monthly payment here and on line 13e, add all amounts that are contractually due to each secured creditor in the 60 months after you file for bankruptcy. Then divide by 60.

Name of each creditor for Vehicle 1	Average monthly payment	
-NONE-	\$	
Total Average Monthly Payment	\$ <b>0.00</b>	<small>Copy here =&gt; -\$ <b>0.00</b></small>
		<small>Repeat this amount on line 33b.</small>
13c. Net Vehicle 1 ownership or lease expense	\$ <b>0.00</b>	<small>Copy net Vehicle 1 expense here =&gt; \$ <b>0.00</b></small>
Subtract line 13b from line 13a. if this number is less than \$0, enter \$0. ....		

**Vehicle 2 Describe Vehicle 2:**

13d. Ownership or leasing costs using IRS Local Standard..... \$ **0.00**

13e. Average monthly payment for all debts secured by Vehicle 2. Do not include costs for leased vehicles.

Name of each creditor for Vehicle 2	Average monthly payment	
\$		
Total average monthly payment	\$ <b>0.00</b>	<small>Copy here =&gt; -\$ <b>0.00</b></small>
		<small>Repeat this amount on line 33c.</small>
13f. Net Vehicle 2 ownership or lease expense	\$ <b>0.00</b>	<small>Copy net Vehicle 2 expense here =&gt; \$ <b>0.00</b></small>
Subtract line 13e from line 13d. if this number is less than \$0, enter \$0. ....		

14. **Public transportation expense:** If you claimed 0 vehicles in line 11, using the IRS Local Standards, fill in the *Public Transportation* expense allowance regardless of whether you use public transportation. \$ **0.00**

15. **Additional public transportation expense:** If you claimed 1 or more vehicles in line 11 and if you claim that you may also deduct a public transportation expense, you may fill in what you believe is the appropriate expense, but you may not claim more than the IRS Local Standard for *Public Transportation*. \$ **0.00**

Debtor 1

David Alexander Matheson

Case number (if known)

18-28089

<b>Other Necessary Expenses</b>		In addition to the expense deductions listed above, you are allowed your monthly expenses for the following IRS categories.
16.	<b>Taxes:</b> The total monthly amount that you will actually pay for federal, state and local taxes, such as income taxes, self-employment taxes, social security taxes, and Medicare taxes. You may include the monthly amount withheld from your pay for these taxes. However, if you expect to receive a tax refund, you must divide the expected refund by 12 and subtract that number from the total monthly amount that is withheld to pay for taxes.	
	Do not include real estate, sales, or use taxes.	
	\$ <u>1,365.00</u>	
17.	<b>Involuntary deductions:</b> The total monthly payroll deductions that your job requires, such as retirement contributions, union dues, and uniform costs.	
	Do not include amounts that are not required by your job, such as voluntary 401(k) contributions or payroll savings.	
	\$ <u>0.00</u>	
18.	<b>Life Insurance:</b> The total monthly premiums that you pay for your own term life insurance. If two married people are filing together, include payments that you make for your spouse's term life insurance.	
	Do not include premiums for life insurance on your dependents, for a non-filing spouse's life insurance, or for any form of life insurance other than term.	
	\$ <u>125.00</u>	
19.	<b>Court-ordered payments:</b> The total monthly amount that you pay as required by the order of a court or administrative agency, such as spousal or child support payments.	
	Do not include payments on past due obligations for spousal or child support. You will list these obligations in line 35.	
	\$ <u>1,830.00</u>	
20.	<b>Education:</b> The total monthly amount that you pay for education that is either required:	
	<input checked="" type="checkbox"/> as a condition for your job, or	
	<input checked="" type="checkbox"/> for your physically or mentally challenged dependent child if no public education is available for similar services.	
	\$ <u>33.00</u>	
21.	<b>Childcare:</b> The total monthly amount that you pay for childcare, such as babysitting, daycare, nursery, and preschool.	
	Do not include payments for any elementary or secondary school education.	
	\$ <u>0.00</u>	
22.	<b>Additional health care expenses, excluding insurance costs:</b> The monthly amount that you pay for health care that is required for the health and welfare of you or your dependents and that is not reimbursed by insurance or paid by a health savings account. Include only the amount that is more than the total entered in line 7.	
	Payments for health insurance or health savings accounts should be listed only in line 25.	
	\$ <u>0.00</u>	
23.	<b>Optional telephone and telephone services:</b> The total monthly amount that you pay for telecommunication services for you and your dependents, such as pagers, call waiting, caller identification, special long distance, or business cell phone service, to the extent necessary for your health and welfare or that of your dependents or for the production of income, if it is not reimbursed by your employer.	
	Do not include payments for basic home telephone, internet and cell phone service. Do not include self-employment expenses, such as those reported on line 5 of Official Form 122C-1, or any amount you previously deducted.	
	+\$ <u>0.00</u>	
24.	<b>Add all of the expenses allowed under the IRS expense allowances.</b>	
	Add lines 6 through 23.	
	\$ <u>5,808.00</u>	
<b>Additional Expense Deductions</b>		
These are additional deductions allowed by the Means Test.		
Note: Do not include any expense allowances listed in lines 6-24.		
25.	<b>Health insurance, disability insurance, and health savings account expenses.</b> The monthly expenses for health insurance, disability insurance, and health savings accounts that are reasonably necessary for yourself, your spouse, or your dependents.	
	Health insurance	\$ <u>13.00</u>
	Disability insurance	\$ <u>0.00</u>
	Health savings account	+\$ <u>0.00</u>
	Total	\$ <u>13.00</u>
		Copy total here=> <u>.....</u> \$ <u>13.00</u>
Do you actually spend this total amount?		
<input type="checkbox"/> No. How much do you actually spend?		
<input checked="" type="checkbox"/> Yes \$ <u>.....</u>		
26.	<b>Continued contributions to the care of household or family members.</b> The actual monthly expenses that you will continue to pay for the reasonable and necessary care and support of an elderly, chronically ill, or disabled member of your household or member of your immediate family who is unable to pay for such expenses. These expenses may include contributions to an account of a qualified ABLE program. 26 U.S.C. § 529A(b)	
	\$ <u>0.00</u>	
27.	<b>Protection against family violence.</b> The reasonably necessary monthly expenses that you incur to maintain the safety of you and your family under the Family Violence Prevention and Services Act or other federal laws that apply.	
	By law, the court must keep the nature of these expenses confidential.	
	\$ <u>0.00</u>	

Debtor 1

David Alexander Matheson

Case number (if known)

18-28089

28. **Additional home energy costs.** Your home energy costs are included in your insurance and operating expenses on line 8.  
If you believe that you have home energy costs that are more than the home energy costs included in expenses on line 8, then fill in the excess amount of home energy costs  
You must give your case trustee documentation of your actual expenses, and you must show that the additional amount claimed is reasonable and necessary. \$ 0.00

29. **Education expenses for dependent children who are younger than 18.** The monthly expenses (not more than \$160.42\* per child) that you pay for your dependent children who are younger than 18 years old to attend a private or public elementary or secondary school.  
You must give your case trustee documentation of your actual expenses, and you must explain why the amount claimed is reasonable and necessary and not already accounted for in lines 6-23.  
\* Subject to adjustment on 4/01/19, and every 3 years after that for cases begun on or after the date of adjustment. \$ 0.00

30. **Additional food and clothing expense.** The monthly amount by which your actual food and clothing expenses are higher than the combined food and clothing allowances in the IRS National Standards. That amount cannot be more than 5% of the food and clothing allowances in the IRS National Standards.  
To find a chart showing the maximum additional allowance, go online using the link specified in the separate instructions for this form. This chart may also be available at the bankruptcy clerk's office.  
You must show that the additional amount claimed is reasonable and necessary. \$ 0.00

31. **Continuing charitable contributions.** The amount that you will continue to contribute in the form of cash or financial instruments to a religious or charitable organization. 11 U.S.C. § 548(d)(3) and (4).  
Do not include any amount more than 15% of your gross monthly income. \$ 173.50

32. **Add all of the additional expense deductions.**  
Add lines 25 through 31. \$ 186.50

#### Deductions for Debt Payment

33. For debts that are secured by an interest in property that you own, including home mortgages, vehicle loans, and other secured debt, fill in lines 33a through 33e.

To calculate the total average monthly payment, add all amounts that are contractually due to each secured creditor in the 60 months after you file for bankruptcy. Then divide by 60.

Mortgages on your home		Average monthly payment
33a.	Copy line 9b here	=> \$ <u>0.00</u>
Loans on your first two vehicles		
33b.	Copy line 13b here	=> \$ <u>0.00</u>
33c.	Copy line 13e here	=> \$ <u>0.00</u>
33d.	List other secured debts:	
Name of each creditor for other secured debt		Identify property that secures the debt
		Does payment include taxes or insurance?
<b>-NONE-</b>		<input type="checkbox"/> No
		<input type="checkbox"/> Yes \$ <u>0.00</u>
		<input type="checkbox"/> No
		<input type="checkbox"/> Yes \$ <u>0.00</u>
		<input type="checkbox"/> No
		<input type="checkbox"/> Yes + \$ <u>0.00</u>
33e Total average monthly payment. Add lines 33a through 33d		\$ <u>0.00</u>
		Copy total here=> \$ <u>0.00</u>

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34. Are any debts that you listed in line 33 secured by your primary residence, a vehicle, or other property necessary for your support or the support of your dependents?

No. Go to line 35.  
 Yes. State any amount that you must pay to a creditor, in addition to the payments listed in line 33, to keep possession of your property (called the *cure amount*). Next, divide by 60 and fill in the information below.

Name of the creditor	Identify property that secures the debt	Total cure amount	Monthly cure amount
-NONE-		\$ _____	÷ 60 = \$ _____
		Total \$ <b>0.00</b>	Copy total here=> \$ <b>0.00</b>

35. Do you owe any priority claims - such as a priority tax, child support, or alimony - that are past due as of the filing date of your bankruptcy case? 11 U.S.C. § 507.

No. Go to line 36.  
 Yes. Fill in the total amount of all of these priority claims. Do not include current or ongoing priority claims, such as those you listed in line 19.

Total amount of all past-due priority claims ..... \$ **36,471.95** ÷ 60 \$ **607.86**

36. Projected monthly Chapter 13 plan payment

Current multiplier for your district as stated on the list issued by the Administrative Office of the United States Courts (for districts in Alabama and North Carolina) or by the Executive Office for United States Trustees (for all other districts).

To find a list of district multipliers that includes your district, go online using the link specified in the separate instructions for this form. This list may also be available at the bankruptcy clerk's office.

Average monthly administrative expense

X **10.00**

\$ **75.80** Copy total here=> \$ **75.80**

37. Add all of the deductions for debt payment.

Add lines 33e through 36.

**Total Deductions from Income**

38. Add all of the allowed deductions.

Copy line 24, All of the expenses allowed under IRS expense allowances ..... \$ **5,808.00**

Copy line 32, All of the additional expense deductions ..... \$ **186.50**

Copy line 37, All of the deductions for debt payment ..... +\$ **683.66**

Total deductions ..... \$ **6,678.16** Copy total here=> \$ **6,678.16**

## Part 2: Determine Your Disposable Income Under 11 U.S.C. § 1325(b)(2)

39. Copy your total current monthly income from line 14 of Form 122C-1, *Chapter 13 Statement of Your Current Monthly Income and Calculation of Commitment Period*. \$ **6,356.28**

40. Fill in any reasonably necessary income you receive for support for dependent children. The monthly average of any child support payments, foster care payments, or disability payments for a dependent child, reported in Part I of Form 122C-1, that you received in accordance with applicable nonbankruptcy law to the extent reasonably necessary to be expended for such child. \$ **0.00**

41. Fill in all qualified retirement deductions. The monthly total of all amounts that your employer withheld from wages as contributions for qualified retirement plans, as specified in 11 U.S.C. § 541(b)(7) plus all required repayments of loans from retirement plans, as specified in 11 U.S.C. § 362(b)(19). \$ **0.00**

42. Total of all deductions allowed under 11 U.S.C. § 707(b)(2)(A). Copy line 38 here => \$ **6,678.16**

43. Deduction for special circumstances. If special circumstances justify additional expenses and you have no reasonable alternative, describe the special circumstances and their expenses. You must give your case trustee a detailed explanation of the special circumstances and documentation for the expenses.

## Describe the special circumstances

## Amount of expense

Attorney Fee Ch. 13 \$ **83.33**

\$ \_\_\_\_\_

\$ \_\_\_\_\_

Total \$ **83.33** Copy here=> \$ **83.33**44. Total adjustments. Add lines 40 through 43. => \$ **6,761.49** Copy here=> -\$ **6,761.49**45. Calculate your monthly disposable income under § 1325(b)(2). Subtract line 44 from line 39. \$ **-405.21**

## Part 3: Change in Income or Expenses

46. Change in income or expenses. If the income in Form 122C-1 or the expenses you reported in this form have changed or are virtually certain to change after the date you filed your bankruptcy petition and during the time your case will be open, fill in the information below. For example, if the wages reported increased after you filed your petition, check 122C-1 in the first column, enter line 2 in the second column, explain why the wages increased, fill in when the increase occurred, and fill in the amount of the increase.

Form	Line	Reason for change	Date of change	Increase or decrease?	Amount of change
<input type="checkbox"/> 122C-1				<input type="checkbox"/> Increase	\$ _____
<input type="checkbox"/> 122C-2				<input type="checkbox"/> Decrease	\$ _____
<input type="checkbox"/> 122C-1				<input type="checkbox"/> Increase	\$ _____
<input type="checkbox"/> 122C-2				<input type="checkbox"/> Decrease	\$ _____
<input type="checkbox"/> 122C-1				<input type="checkbox"/> Increase	\$ _____
<input type="checkbox"/> 122C-2				<input type="checkbox"/> Decrease	\$ _____
<input type="checkbox"/> 122C-1				<input type="checkbox"/> Increase	\$ _____
<input type="checkbox"/> 122C-2				<input type="checkbox"/> Decrease	\$ _____

Debtor 1

**David Alexander Matheson**

Case number (if known)

**18-28089**

**Part 4: Sign Below**

By signing here, under penalty of perjury you declare that the information on this statement and in any attachments is true and correct.

**X /s/ David Alexander Matheson**

**David Alexander Matheson**

Signature of Debtor 1

Date **December 7, 2018**

MM / DD / YYYY

**Current Monthly Income Details for the Debtor****Debtor Income Details:**Income for the Period **04/01/2018 to 09/30/2018**.**Line 5 - Income from operation of a business, profession, or farm**Source of Income: **Clients**

Income/Expense/Net by Month:

	Date	Income	Expense	Net
6 Months Ago:	<b>04/2018</b>	<b>\$5,236.68</b>	<b>\$357.18</b>	<b>\$4,879.50</b>
5 Months Ago:	<b>05/2018</b>	<b>\$8,322.44</b>	<b>\$303.85</b>	<b>\$8,018.59</b>
4 Months Ago:	<b>06/2018</b>	<b>\$6,693.86</b>	<b>\$409.02</b>	<b>\$6,284.84</b>
3 Months Ago:	<b>07/2018</b>	<b>\$6,188.59</b>	<b>\$573.84</b>	<b>\$5,614.75</b>
2 Months Ago:	<b>08/2018</b>	<b>\$8,266.83</b>	<b>\$858.34</b>	<b>\$7,408.49</b>
Last Month:	<b>09/2018</b>	<b>\$5,750.00</b>	<b>\$328.33</b>	<b>\$5,421.67</b>
Average per month:		<b>\$6,743.07</b>	<b>\$471.76</b>	
Average Monthly NET Income:				<b>\$6,271.31</b>

**Line 7 - Interest, dividends, and royalties**Source of Income: **Book Royalties**

Income by Month:

6 Months Ago:	<b>04/2018</b>	<b>\$51.26</b>
5 Months Ago:	<b>05/2018</b>	<b>\$36.68</b>
4 Months Ago:	<b>06/2018</b>	<b>\$72.44</b>
3 Months Ago:	<b>07/2018</b>	<b>\$243.86</b>
2 Months Ago:	<b>08/2018</b>	<b>\$105.59</b>
Last Month:	<b>09/2018</b>	<b>\$0.00</b>
Average per month:		<b>\$84.97</b>